Purpose

To describe ways to use computer reports in tracking WIC participation and managing caseload.

Reports

The following reports can be used to track participation in the NE WIC Program. Information contained in these reports can be used for caseload management, monitoring, high priority targeting, and USDA reporting.

301 Enrollment & Participation Report

NE WIC 301 (Enrollment and Participation Report):

This report is used to track monthly participation by priority, category and ethnic group.

The 301 report tracks participation for the current month. All clients receiving checks and totally breastfed infants are considered participating on the 301 report.

Participation is the number reported to USDA. It is also used by the State when determining Local Agency funding through the funding formula. A record of monthly caseload can be used to estimate service to the potential eligible population and to target under-served populations by category and ethnic group.

The participation report includes all checks that have been voided by the 10th of the month. This report may be run at the Local Level and should be run as close to the 16th of the month as possible in order to coincide with the State reports.

The Local Agency WIC Director/Coordinator should review the report along with the Fiscal Year Caseload Tracking Report provided by the State WIC Office on a monthly basis.

This report also provides enrolled numbers. Enrolled participation counts clients who are active and pending.

Report 301 continued

The 301 Report also indicates the number of no-shows and percent of total enrolled.

- No-show percent = percent of participants who did not receive WIC checks but could have. (participation/enrolled)
- Enrolled = all active and pending clients who could have received a check during that month.
- Participating = all clients who received one or more checks during that month.

In addition, this report provides information on homeless, migrant, refugee, and totally breastfed infant numbers.

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340 Participation Summary Report

The 340 (Participation Summary Report) contains current data on total participation numbers and percentages by the following categories: women, infants, and children within a Local Agency who have participated in the WIC program for a given month. The report lists data by Local Agency and State totals. If run on the same day as the 301 report, the participation numbers will match. This report should be run after the 10th of the month in order to reflect voids processed.

This report is useful in comparing your Local Agency percent of women, infants, and children served with other agencies and with the State.

This report is run at the State level and sent to the Local Agency monthly and is useful in tracking current caseload by category, (women, infants, children). It lists numbers and percentages for all Local Agencies.

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293 Food Package Cost By Status Report

The 293 (Food Package Cost by Status Report) may be considered both a participation report and a financial report. When used as a participation report, it provides redeemed participation numbers for the **closeout** month.

- Redeemed participation = counts all persons who have cashed one or more checks for the month requested.

This report is useful in calculating your redemption rate. (Divide the participation number on the 293 by the participation number on the 301 report for the same month).

Report 293 Continued

This report is run at the State level and sent to the local agency monthly and is useful in tracking closeout caseload by status, food package cost by status and food package cost per participant.

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303 Unduplicated Participation By County

The 303 (Unduplicated Participation by County) lists a total number of unduplicated active participants within given counties for each Local Agency.

This report is useful in determining distribution of clients by county of residence within each clinic and Local Agency.

This report may be run at the local level and will give a page for each clinic and a Local Agency summary. When run at the state level it will print a report for each Local Agency and a State summary.

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330 Unduplicated Annual Count Of Participants

The 330 (Unduplicated Annual Count of Participants) is designed to count the annual unduplicated participation for the period requested.

This report provides total numbers for all participating clients in the time period requested. Participant numbers are provided by priority and subdivided by participant status. Total numbers for women, infants, and children and clinic/LA/State totals are also provided. This report contains only those clients who have participated during that fiscal year, (Oct.-Sept.). Since this report was designed to be generated on an annual basis, it should be remembered that if it is run during the year, this report should be considered a "point-in-time" summary. In order to get final numbers for the fiscal year; this report should be run as a **closeout** report.

This report can be run at both the State and Local Level. For reports generated at the Local Level, details will be provided by clinic and LA summary. Reports generated at the State level provide information by LA and State summary.

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360 Transfer Log

The 360 (Transfer Log) is printed daily at the state level. This report is mailed to Local Agency staff weekly. The transfer log lists the agency/sub-agency and clinic where the participant was transferred from or to. It also identifies the participant number, family number and date the transfer took place. The initials in the 'BY' column identify the last person who updated the client record, assuming that person was logged onto the computer where the update took place.

When received:

- Identify transfers in the 'FROM' column that belong to your agency.
    - These clients have been transferred out of the agency/clinic identified and the paper file should be transferred/filed appropriately.

- These clients should be removed from the appointment scheduler.
- If checks were auto bulked for the clinic, checks printed for these clients should be removed from the stack and voided.
- Check the computer system to verify the transfer was completed correctly.

- Identify transfers in the 'TO' column that belong to your agency.
  - These clients have been transferred to your agency/clinic and a paper file should be created or the current file transferred appropriately.
  - Check the computer system to verify the transfer was completed correctly.